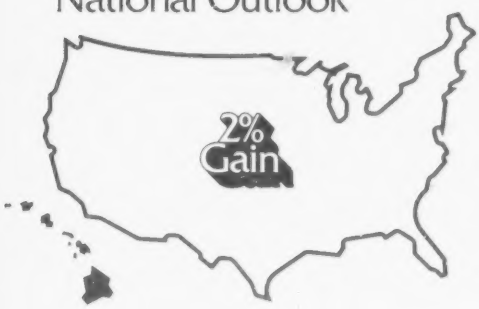
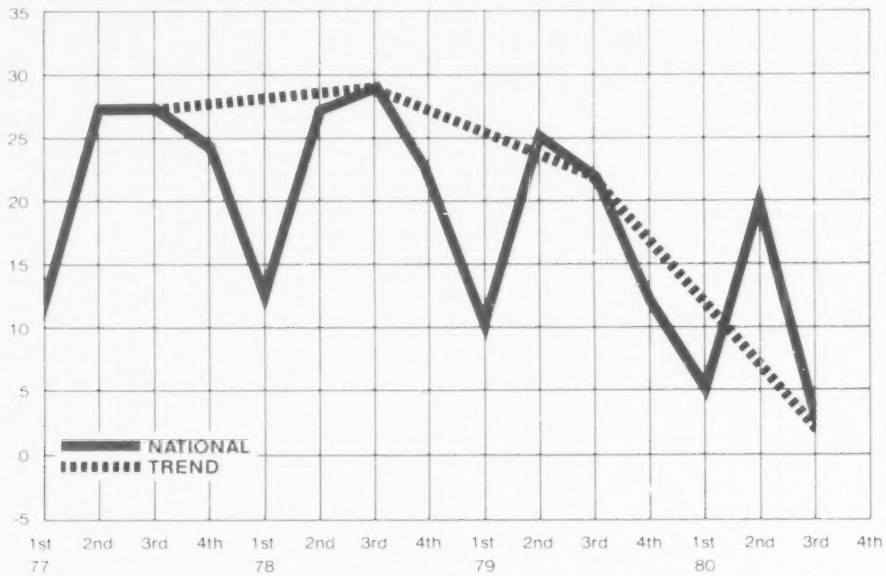
Manpower, Inc. Employment Outlook Survey

Third Quarter
July August September
1980

National Outlook



MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

A sharp decline in anticipated new hirings is projected for the third quarter, 1980, confirming a recession psychology among the nation's employers. The latest survey results indicate sharper decreases in overall employment expectations than those of the past year, when a progressive slowdown in employment opportunities was measured.

This drop in employment expectations is recorded for all regions of the country and all sectors of the non-agricultural economy. Survey results record the lowest level of anticipated increases to staff for a July through September period in the four-year history of the survey, while the number of firms planning workforce reductions is the highest reported at any time in the past four years.

The sharpest decline is registered among manufacturers of durable goods, where current expectations are significantly below those of one year ago. Here, firms planning reductions to workforces far exceed those planning additions.

A similar pattern is noted for the public administration sector.

Seasonal factors, combined with declining population groups, account for the reduced employment outlook in the education sector, which currently posts the least favorable hiring plans recorded since four years ago.

Among services and mining employers, moderate resistance to employment reductions is noted, although latest findings for these sectors remain below year-ago levels. During the past year these two sectors have shown the least decline in employment expectations.

Lackluster opportunities are recorded for both the building and wholesale/retail trades. Intentions of construction employers, with already pared crews, are counter to normal seasonal patterns and are well below previous third quarter levels. Relatively few merchants plan to strengthen staff, resulting in the lowest report of new hirings recorded for this time in four years. In both of these sectors, the percentage of firms planning reductions to staff approaches those expecting increases.

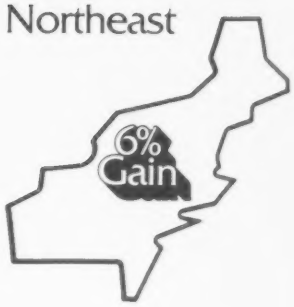
Similar results are recorded for the light manufacturing sector.

In the remaining sectors of the non-agricultural economy, finance/real estate/insurance and transportation/public utility, significantly fewer employment opportunities are projected for the third quarter than at this time in previous years.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	23	64	11	2
Construction	25	50	20	5
Manufacturing—Durable Goods	15	56	25	4
Manufacturing—Nondurable Goods	19	62	16	3
Transportation & Public Utilities	21	61	15	3
Wholesale & Retail Trade	17	65	14	4
Finance, Insurance & Real Estate	19	68	11	2
Education—Public & Private	15	56	24	5
Services	25	63	9	3
Public Administration	17	59	19	5
All Industries	19	60	17	4

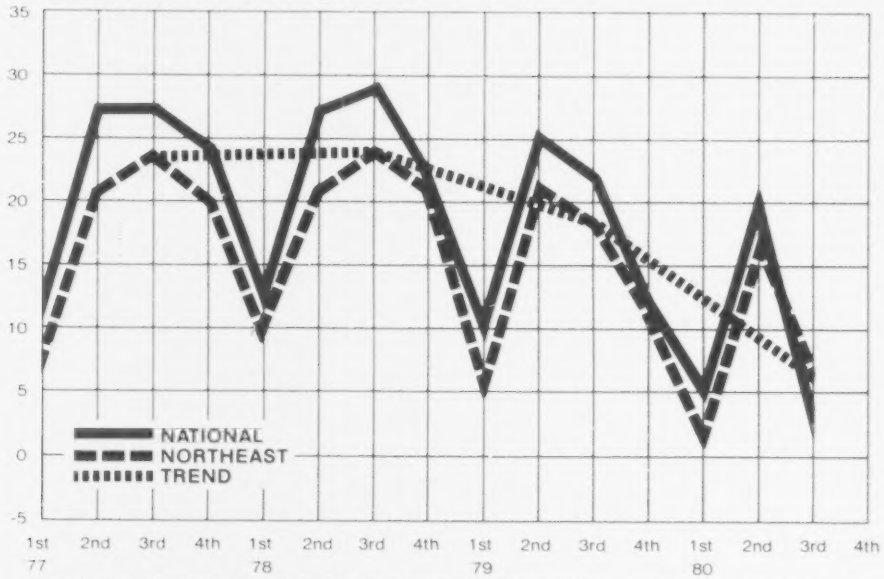
Note: These figures are not adjusted for seasonal variations.

Northeast



Connecticut
Maine
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

Measurably fewer Northeast employers plan workforce additions during the coming quarter, in line with national trends, than at this time one year ago. Overall, employment expectations here exhibit relatively greater resistance to staff reductions than employer plans measured elsewhere, however.

Durable goods manufacturers planning staff reductions far outpace those expecting increases, with the number of firms posting reductions at an all-time high. This is the lowest measurement of employer expectations recorded since 1976, when the survey was redesigned to reflect these changes.

Additions to staff planned by manufacturers of non-durable goods only slightly exceed expected declines, for reduced employment opportunities here. The reported reductions in staff are the highest for this period in the last four years.

Fewer employment opportunities are expected by construction employers; a dramatic increase in reports of staff reductions over prior year levels is measured as well.

More public administration and transportation/public utility employers post plans for staff increases during the coming months than in previous third quarters. However, reductions are also planned by more employers than one year ago, offsetting the gain.

Fewer merchants plan to hire additional workers than at this time one year ago, for a slowdown in employment opportunities. A similar trend is recorded for the services sector.

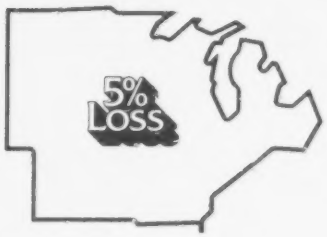
Education employers project generally stable employment levels, in line with seasonally anticipated patterns.

Expectations of finance/real estate/insurance employers are slightly below those recorded one year ago, but without a dramatic change from the twelve month trend of a hiring slowdown.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	23	53	17	7
Manufacturing—Durable Goods	14	59	22	5
Manufacturing—Nondurable Goods	16	66	13	5
Transportation & Public Utilities	25	56	16	3
Wholesale & Retail Trade	19	64	12	5
Finance, Insurance & Real Estate	18	70	6	6
Education—Public & Private	13	61	17	9
Services	22	68	6	4
Public Administration	23	57	15	5
All Industries	19	63	13	5

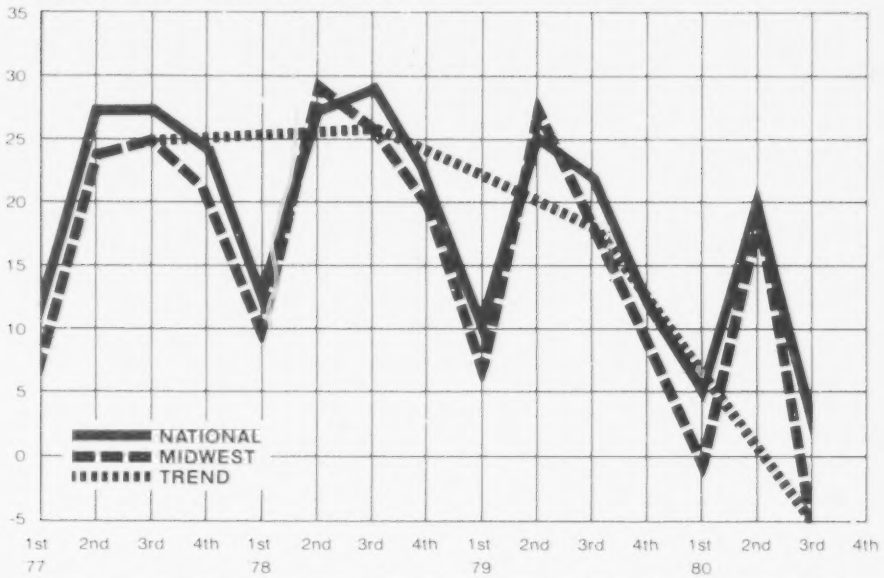
Note: These figures are not adjusted for seasonal variations.
*The size of the mining industry's responding sample does not permit a hiring trend forecast.

Midwest



Illinois
Indiana
Iowa
Kansas
Michigan
Minnesota
Missouri
Nebraska
North Dakota
Ohio
South Dakota
Wisconsin

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

The sharpest declines in employment expectations are noted for the Midwest, with the number of employers planning decreases to staff far outpacing those expecting increases. During the past year, significantly lower levels of employment opportunities have been noted for the Midwest than in other regions.

During the coming months, additions to staff are likely to occur within the services sector only, although the level of increase is considerably slowed from year-ago findings.

The greatest degree of change is projected for the durable goods manufacturing sector, heavily concentrated here. Planned reductions in staff far exceed minor reports of workforce additions, with the reductions planned by an unusually large proportion of respondents.

In the non-durable goods manufacturing sector, plans for workforce reductions exceed those of new hiring. Similar patterns exist in the wholesale/retail, transportation/public utility, construction and finance/real estate/insurance sectors. In each of these areas, latest findings are the lowest recorded at this time in the four year history of the survey.

In the public administration area, plans for reduced employment also exceed projections of new hiring, by a significant degree. During the past nine months, employment expectations in this sector have been steadily falling.

Greater than seasonal declines are projected among education employers polled, for the lowest outlook in this sector since the third quarter, 1976.

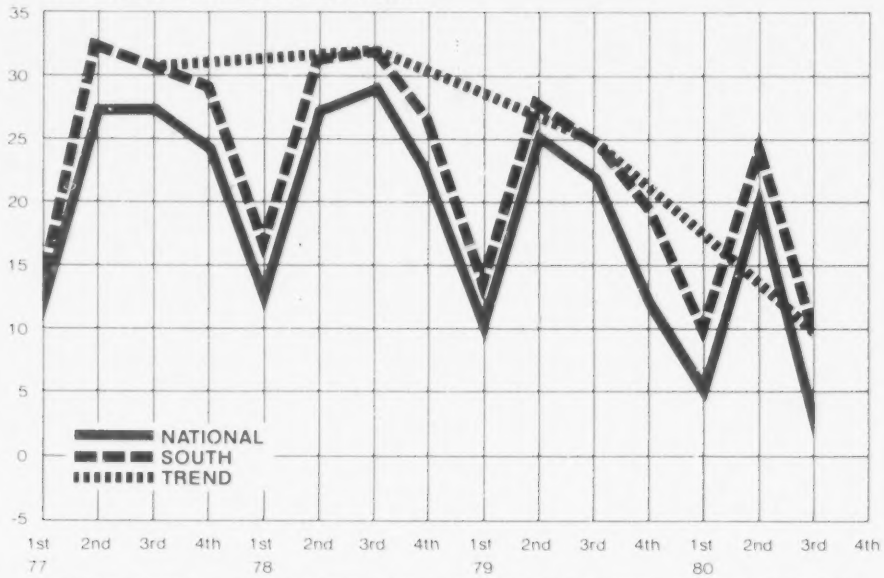
Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	21	49	25	5
Manufacturing—Durable Goods	11	50	34	5
Manufacturing—Nondurable Goods	16	60	21	3
Transportation & Public Utilities	12	68	16	4
Wholesale & Retail Trade	13	69	14	4
Finance, Insurance & Real Estate	13	71	15	1
Education—Public & Private	13	55	30	2
Services	22	64	11	3
Public Administration	17	58	24	1
All Industries	15	62	20	3

Note: These figures are not adjusted for seasonal variations.

*The size of the mining industry's responding sample does not permit a hiring trend forecast.

Alabama
Arkansas
Delaware
District of Columbia
Florida
Georgia
Kentucky
Louisiana
Maryland
Mississippi
North Carolina
South Carolina
Tennessee
Texas
Virginia
West Virginia

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

The South continues to post the most optimistic employment expectations, although latest findings more closely parallel national results than in previous reports. For the third quarter, employers expect significantly fewer workforce additions, than in previous third quarters, while the number of firms anticipating declines in staffing is dramatically above prior third quarter reports.

Mining and services employers remain somewhat optimistic; new hirings in both sectors are slightly below year-ago levels, however.

Construction employers, too, are somewhat optimistic. However, the number of firms planning new hirings is at a four year low for this period, and those planning reductions in staff is the highest ever for this quarter.

Little overall change is anticipated by manufacturers of both durable and non-durable goods, with the number of firms planning workforce additions slightly exceeding those expecting reductions. In both these sectors, planned reductions to staff are at their highest levels during the past four years.

A similar pattern exists among the region's wholesale/retail merchants, seasonal factors notwithstanding.

Significantly fewer new employment opportunities are recorded for both the transportation/public utility and finance/real estate/insurance sectors than in previous third quarter measurements. Here, planned reductions to staff are sharply above prior levels. A parallel trend is also observed among public administration employers.

In the education sector, planned staff additions exceed reductions by a close margin, down from historical levels when more robust expectations have been reported.

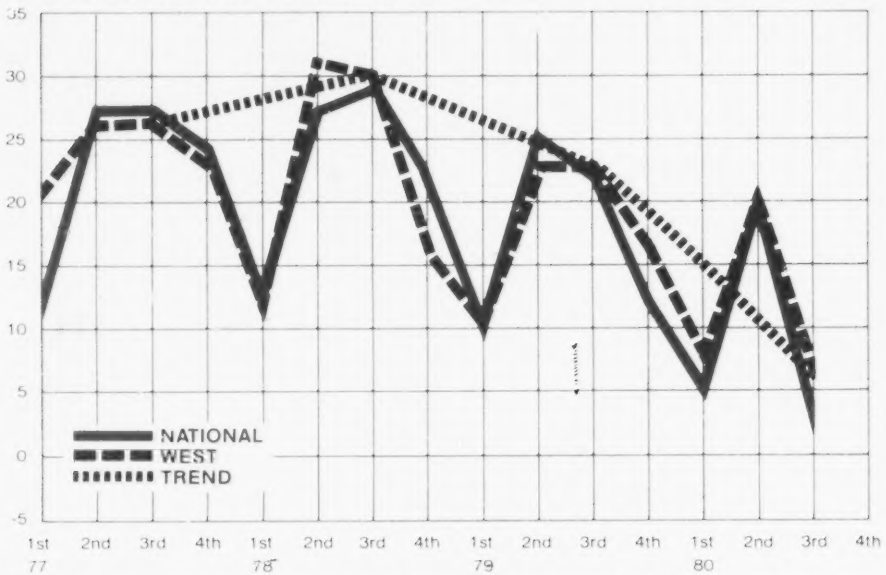
Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	32	64		4
Construction	32	48	16	4
Manufacturing—Durable Goods	22	56	19	3
Manufacturing—Nondurable Goods	21	61	16	2
Transportation & Public Utilities	22	61	13	4
Wholesale & Retail Trade	20	62	14	4
Finance, Insurance & Real Estate	24	66	10	
Education—Public & Private	22	59	17	2
Services	31	57	8	4
Public Administration	17	61	17	5
All Industries	24	59	14	3

Note: These figures are not adjusted for seasonal variations.

West

Arizona
California
Colorado
Hawaii
Idaho
Montana
Nevada
New Mexico
Oklahoma
Oregon
Utah
Washington
Wyoming

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

Employment expectations for the West are sharply below prior third quarter levels, in line with national trends. Overall, findings for this region now more closely parallel national results than at any time in the past four years.

Employers in the construction and mining sectors expecting staff reductions during the coming months more than outpace those with hiring plans, for the lowest employment outlook in these sectors recorded for this period during the past four years.

A continued slowdown in new hiring, coupled with increased reports of reduced workforces, is noted for the manufacturing and transportation/public utility sectors. This trend has been observed among the manufacturers for the past year.

Education employers project generally flat levels, in tune with seasonal factors, but with a significant softening in plans for new hiring. A generally flat outlook is also registered for the wholesale/retail trades, where firms planning additions to staff equal those expecting reductions. For the merchants, this is a significant softening from year-ago levels.

A measurable decline in employment opportunities is recorded for the public administration sector, where plans for staff additions match those of decreases. This public sector outlook is the most negative during the past two years.

The services and finance/real estate/insurance sectors continue to post relatively positive employment plans, although the number of firms, in both areas, projecting increases has eased from previous third quarter reports.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	10	70	20	
Construction	23	46	28	3
Manufacturing—Durable Goods	24	55	16	5
Manufacturing—Nondurable Goods	25	62	10	3
Transportation & Public Utilities	25	58	16	1
Wholesale & Retail Trade	19	58	19	4
Finance, Insurance & Real Estate	16	72	6	6
Education—Public & Private	8	55	27	10
Services	27	61	10	2
Public Administration	16	60	16	8
All Industries	22	58	16	4

Note: These figures are not adjusted for seasonal variations.

MANPOWER
TEMPORARY SERVICES
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The quarterly Employment Outlook Survey is conducted as a public service of Manpower, Inc. The survey was designed and is administered by Manpower's International Research Department, utilizing a statistically representative sample of approximately 8,000 large public and private employers from among ten industrial sectors in more than 250 U.S. cities.

The Survey is a measurement of employment plans for the permanent workforce and is based upon telephone interviews conducted with the survey sample immediately prior to the conclusion of the preceding calendar quarter.

The Survey results reflect the intentions of the sample of employers interviewed. Some of these intentions may change unexpectedly upon the conclusion of the survey.